

## **Case Study Marketing Topics: An Interview with Steve Slaunwhite**

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*The following is a transcript of an interview with leading B2B copywriter Steve Slaunwhite. The interview was conducted by Sheldon Gladstein, of the Written Works copywriting team. Written Works specializes in writing clear and effective case studies. The interview took place in June of 2007.*

**SG: Hi Steve, thanks for taking the time to speak with me! I'd like to discuss several themes related to marketing case studies. Can we start by talking about the theme of getting buy-in for a case study?**

SS: That's a very common and pressing problem that a lot of companies have. In fact, it's often the first question they'll ask before they consider writing a case study or a success story of any kind is: how do I approach my own customers for this. There are a number of things that I suggest; this is in no particular order.

First of all, a lot of business to business companies use case studies. They will have a sales force. So, sales people are the people who deal with customers day to day on a gut to gut basis. So that is often the best place to start - engage the sales people. Go to your sales people, and say something to the effect of: "We would like to write about some of the success stories that our product and services are having with our customers." Ask the sales people: "In the customers that you deal with on day to day basis, is there any one that would be interested in participating in a success story about our products and services at their company. And often each sales person will come up with two or three candidates for a case study. And it's possible to generate dozens of prospects for a case study just doing that; communicating with your sales force.

**SG: Are you suggesting that sales people should ask them directly, or should they just recommend people?**

SS: They should know people from the top of their head.

**SG: Who of them is most likely to be interested doing this, or who the happiest customer is?**

SS: Before I became a copywriter, I spent many years in sales. I know how it works. Sales people will know the best customers to approach for this, the best success stories, if the customer has the right personality for it, the whole bit. Because the sales people deal with these people across the desk - face to face, they take them for lunch, so they know these people, so they know which ones would be the best candidates. So, the sales force

is the most important place to go first to look for candidates for success stories, ask the sales force. That's a good place to look for candidates and get candidates.

Another way to do it is to have someone conduct a survey. Have an outside consultant like yourself, Sheldon, contact the list of customers. Ask them some questions about their experience with the product and service. For example, let's say your client is UPS. That company might provide you with a list of companies that they deal with for package delivery. A consultant like you would call and talk to the logistics manager, the warehouse manager, whoever is involved in the day-to-day package delivery part of things and ask them a list of questions - are you happy with the services of UPS, what is your favorite thing about UPS, what is the thing that you don't like about UPS. When a problem comes up has it been resolved? What's your experience with using the UPS freight collect service, and using the UPS international logistic services, that kind of things.

And through the process of conducting the survey, you will often generate a lot of testimonial material, a lot of success stories. For example, if you are interviewing a customer, and the customer says something like "We've been dealing with UPS for seven years and they have been integral to the success of our company. They've been really good about keeping their rates low, and at the same time their package delivery is so quick, our customers love it, bla bla bla...." That's a success story. You've identified a success story. And basically, all you have to ask is: "Mr. Customer, would you be willing to participate in a case study on this amazing success that you had with using UPS services?" So, getting an outside consultant or copywriter to contact your key people on your customer list and doing a quick survey is a great way to generate subjects for a case study. The reason why you want an outside consultant to do it, because the customer may say things to an outside consultant that they wouldn't say to someone in house, for obvious reasons.

There are some things to consider when you're approaching someone for a possible success story: don't put any eight hundred pound gorillas in the process. Don't make things so complicated and arduous for them that it's just more work than it needs to be. Let me give you an example:

There is one company I was working with, and when they approached someone for a customer success story, they gave them a form which they had to fill out about these twelve or fifteen questions about the success they had with the product, bla bla bla... And at the last page of the form there was like a contract, they have written legal agreement on it, saying that they can use this information in this questionnaire for our case study, bla bla, and we own the rights, and all this kind of stuff, legalese stuff. So, they were forcing customers they were approaching to fill out this huge six page Q and A plus sign this legalish form. That would scare the heck out of you. You know what I mean? That was a huge impediment. First of all, customers don't have time to fill out a big questionnaire for a case study that *you* want. And secondly, once you hit them with this kind of form full of legalese, they are going to take that to they own legal department. That's another big impediment. So, don't put any eight hundred pound gorillas in the process. In other words, make the process as simple as possible. Approach a customer and say: "We'd like to feature the amazing success that you had with our products or services in a case study.

You don't have to do anything. We'll have someone interview you for 10-15 minutes, they will have intelligently prepared questions, so you are not educating them on who you are, they'll already have done some research on your company, on your products and services that you use from us. When we are done with the case study, we will send it to you for your approval. We don't do anything with it, unless you are 100% approved on it, bla bla bla..." So, in other words, keep all the work off their shoulders, and make the process as easy as possible.

Thirdly, when you are approaching someone for a potential case study, talk to someone in marketing or PR first. For example, you are dealing with engineers, and you want to do a case study about how the engineer has used your software development product. That's fine, but don't approach the engineer first. Approach the marketing or PR department. And say: "We've been dealing with Joe Blow, engineer on our product. He is very happy with it, and your company has really benefited from it. We wondering if you would be interested in us doing a success story or a case study featuring the success your company has had." The marketing and the PR people will understand the value of that to them. They know what a case study is. They'll understand the value of it. And it's easier to go through them. And they can make things happen at their end. The engineer, or other user of your product, the warehouse manager, the sales manager or even the president of the company, may not understand what it's all about. And when people don't understand, they kind of default to no. Or they'll say something like: "Wellllll, I'll have to talk to some of my people about that, and get back to you." and that kind of thing. They just don't understand what it is.

**SG: So, marketing or PR will facilitate the process?**

SS: Yes, because they know the value of a case study to them. So yes, they'll facilitate the process. They'll know what it's all about. Another thing is, you always emphasize to the customer that they will have a final say. You will not write anything about them that they haven't read first, and approved. This is a big issue. A lot of companies are a bit nervous about participating in a case study, because they feel that they are not going to be able to control what are you going to say about their company. So always say: "Listen, we don't put any quotes in, we don't quote you, we don't say anything about your company that you haven't approved first. We write the case study, and we send it to you for your approval before we publish it or use it in any way." So make sure that that's emphasized. That will be a load off their shoulders, because that's a big concern. So they'll say "OK, good, so we can participate in a success story, and we will review it, and be able approve it ourselves before we use it. That's good."

Also, emphasize that you are showcasing their success. Some customer may interpret case studies as showcasing their problems. Say it's a success story, you want to showcase their success and success the company has had with your products and services. People are attracted to success. So, when they read a case study about ABC company and the case study is from XYZ company, (featuring both companies), both companies look good in a success story. It's about success, people are drawn to that and emphasize that.

Also emphasize to the customer how the case study will be used. If the company you're working for has had experience getting the case study reproduced in major trade

magazines or business magazines, industry publication things of that nature, that's good publicity for the company. So emphasize how the case study will be used. It's free publicity, basically, it's the reason why people participate in case studies. So emphasize that part of it.

And that's about it. That's all the points I've had, and that's basically how I would describe it to customers, in no particular order. You can order those in a different way that makes more sense.

**SG: How about some of the reservations that companies trying to get others to do case studies might have? Like, I think you mentioned once before, opening the Pandora's box kind of thing?**

SS: Oh, yes, we are talking about reservations that company has won't even do case studies. One reservation that they have is, they don't want to bother their customer. They say: "I really don't want to bother my customer by getting them to participate in a case study, because, I don't want to ask them to do something for us. It's hard enough to get them to buy our products. Now we are going to go and ask them to give us something for free, by participating in a case study." But really, what you're doing is you are offering your customer a chance for free publicity. You are saying: "We'd like to develop a success story featuring both our companies. We're going to use that success story in our publicity campaign. It doesn't cost you, our customer anything." So, they need to think about it as a value added service to their customers. Not as an imposition to their customers. But you got to change your way of thinking. Because, if you're thinking it's an imposition to the customer, you are going to approach your customer with that thought in mind. And you are going to be meek and go: "Ummm, we are doing a case study. Would it be OK to feature you....?" No. You don't want that kind of approach. You want to say: "We have this great opportunity to create a case study featuring how successful your company has been with our products and services. It's going to be a success story to showcase both of our companies. You will have final say.." That kind of thing.

Another reservation that companies have when approaching their customer for a case study is like you just mentioned, the Pandora's box. They worry that things are OK with the customer, but if I start asking them questions about how they feel about us, they might say some things that are negative. First of all, nine times out of ten, that doesn't happen.

**SG: Because, people are just sensitive not to use that... ?**

SS: They are going to hear a lot of good things. And also, if the company has agreed to do a case study, and they get interviewed, they are already predisposed to say good things. But - here is a big but - that one time out of ten that a customer does say something negative to you, you interview them for a case study, and a customer says: "Oh, and by the way, we really didn't like the way this was handled in the spring, when our system went down, and we asked for service, and it took three days to get fixed; that was really expensive for us. We lost a lot of productivity there, and weren't really happy with the way that was handled." What do you do with that? Put it in a case study? That's the Pandora's box.

But when a customer says that to you, that is actually good news. Because that's obviously something that's nagged at that customer for a while. And that could be a threat to the customer relationship that you didn't even know is there. So, it's worth it to be able to respond to that. And if you are a consultant interviewing on behalf of the company you can say: "You know, that is very important point. I am sure my client didn't know that that situation was even an issue. I'm going to draw their attention to it, and someone will call you." Or if the company themselves is calling, they can act on that situation right away. And perhaps, have an opportunity to say: "Sorry, we'll make the things better." So, it's good no matter what happens.

**SG: I assume if they have agreed to participate in a case study, they are not going to come in with a mindset of criticism.**

SS: No, but sometimes it happens. That one time out of ten, someone will say: "Here is my opportunity to vent." And that has happened to me, Sheldon. I've done interviews on behalf of companies, and the person gets on the phone, and they say: "Before we get started, I really have a couple of bones to pick about this company." So, it's their opportunity to vent at somebody. And that sometimes happens. But that's good. They are obviously not happy. It's good to get those issues taken care of, rather than have them fester. But that sometimes happen, and in one rare circumstance, it's only happened once to me, the person had so many complaints, that my client ended up not doing the case study. The person was just too upset. They had nothing good to say. I couldn't pull any good stuff from him. But that's pretty rare. And it's good to know.

Any other reservations, that come up, that you know of? I can't think of any. Those are the two biggies for me.

**SG: Maybe people have reservation that they are not going to get great material and they've already made a commitment to press forward with this case study and made it seem like it's going to be the greatest thing in the world, but the client being interviewed actually doesn't do too well with the interview...**

SS: There is an interview trick that works well, and I don't know if I mentioned it last time when we talked. Use these words: "Would it be fair to say..." If you have trouble getting some good quotes from a client, and let's say you have software that is supposed to improve your customer service, you can say: "Would it be fair to say that our software product improved your customer service by at least 20%?" If the person says "Yes", you can quote them. "Our software improved their customer service by 20%." That type of thing. If you say: "Would it be fair to say..." and kind of lead them along, even with the most reluctant person who doesn't interview well, you can pull a lot of good stuff from them. That has a lot to do with preparing for an interview and knowing what you're trying to get.

**SG: And with your interviewing skills, if you are going to get people to talk.**

SS: Of course. You want to do research upfront, and know what the success story is before you ask the question. It's like in court: a good lawyer never asks a witness a

question he does not know the answer to. You want to know the answers in advance. You don't want any surprises, and you want to be able to pull it from them like that.

And also keep in mind, (we are going a little off topic here), but here are some important points: you can quote somebody something that they didn't actually say word for word. Let's say someone said through the conversation: "It did improve our customer service" and later on you probed and then - "Yeah, about 20%", you can put that together in a single quote and say "It improved our service 20%" Because remember, you are sending the case study back to the client, so they are going to see the quotes and approve it. And they are going to say "Yes, this is a representative of what I said." So it's not a misquote. Since you are using what they say, and kind of massaging it to make it sound a little bit better for everyone involved. You don't want to put in the ummmms and ahhhhs, you never do a direct quote like that.

**SG: This is great stuff, this is really helpful.**

SS: My pleasure.

**About Steve Slaunwhite:**

Steve Slaunwhite is a renowned leader in the field of B2B copywriting and consulting. To contact Steve, visit [www.SteveSlaunwhite.com](http://www.SteveSlaunwhite.com) .

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